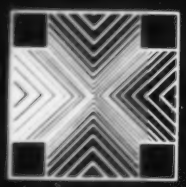

The Graying of the Sunbelt:

A Look at the Impact of U.S. Elderly Migration

By Jeanne C. Biggar

The Graying of the Sunbelt: A Look at the Impact of U.S. Elderly Migration is the sixth in a series of occasional papers, *Population Trends and Public Policy*, published by the Population Reference Bureau, Inc. This series is devoted to a discussion of demographic issues of concern to policymakers.

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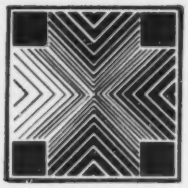


The Graying of the Sunbelt

In Summary

Demographic Trends

- The number of Americans age 60 and over moving to the Sunbelt each year has nearly doubled since 1950. This flow of migrants will continue if not increase during the next decade.
- Florida remains the major destination of U.S. retirees, drawing one-quarter of all the nation's elderly migrants.
- California is second only to Florida in the number of elderly settlers it receives, but its attraction seems to be weakening while Arizona's is growing rapidly. Arizona may soon move ahead of California as the major destination of retirees in the Southwest.
- North Carolina rose from the 17th to the 7th most popular destination for U.S. elderly between 1970 and 1980. Recent increases in the numbers of elderly settling in New Mexico and South Carolina suggest that these states may become important centers of elderly migration in the next decade.
- A significant number of elderly are leaving Florida and California for states outside the Sunbelt. Because these two states were major centers of retirement 20 years ago, these migrants are assumed to be returning to their homestates to be near relatives when a spouse dies, or when they become ill or they encounter financial difficulties. Some of California's outmigrants may be returning to their birthstate once they are free of job ties.
- The majority of Sunbelt migrants are in their early retirement years, well-educated, financially secure, and they are usually accompanied by a spouse. However, those leaving the Sunbelt are more likely to have incomes below the poverty line, be disabled or living in institutions or homes for the aged.
- Arizona and Florida are receiving the wealthiest and most independent of all elderly migrants. The groups of migrants settling in California and Texas include the largest number of needy and dependent elderly.

Policy Implications

- All Sunbelt states will have to cope with larger numbers of older citizens. Increased demand for housing will press the capacity of local utilities. The elderly's vulnerability to crime will bring added demand for police and fire department protection.
- The newcomers bring with them the more fiscally conservative orientation typical of their generation. Their impact on local and state politics is yet to be discerned, but support for public school programs may shift in favor of services for the aged.
- For Arizona and Florida, receiving the wealthiest, most independent migrants, the "graying of the Sunbelt" brings increased demand for retail goods and for housing for retired couples, as well as for recreational, health and protective services.
- For California, receiving the greatest number of poorer migrants, elderly migration will place additional pressure on government welfare services and local agencies for the aged.
- Some northeastern states may experience both a shrinking tax base and a greater demand for local services for the aged as they lose their younger, more independent elderly to the Sunbelt and receive older, more dependent elderly in return.
- States receive federal dollars for senior citizens' programs based on the number of elderly residents in the state, not on the income level of those residents. Unless the federal payment formula is altered to favor states with the neediest elderly residents, migration will strain the resources of many northeastern states and of Sunbelt states receiving the poorest elderly.

/ENTURE IN MOVING

Recent Elderly Migration Patterns

The Sunbelt, extending from Virginia south to Florida and west to California, became home to more than half of all the older persons who migrated between 1975 and 1980. Nearly one million people 60 years old and older—500 per day—moved to one of these states.

Just 20 years ago, only half as many elderly moved South. Small retirement communities in Arizona, Florida, California and Texas provided havens for the affluent elderly escaping northern winters during the 1950s and 1960s. Today those earlier "snowbird" patterns have been replaced by large flows of elderly migrants settling permanently in the Sunbelt states.

The impact of the Sunbelt's influx of elderly residents is being felt socially, economically and politically in both the Sunbelt states and the northern states left behind. An examination of recent data reveals that the Sunbelt is gaining at the North's expense; and, while the newcomers are enriching the economies of Florida and Arizona, they are burdening the resources of California.

On the Road Again: An Overview of Current Trends

The first half of this report focuses on internal migration within the United States. The impact of international migration from outside the U.S. is examined on a state by state basis beginning on page 9. In order to reflect those individuals who retire early, this report defines "elderly" as age 60 years old and older.

Generally, retirees are less mobile than younger people in the work force. Less than five percent of the U.S. elderly population ventured to make an out-of-state move between 1975 and 1980, compared with ten percent of the total U.S. population.

More than 17 percent of the total U.S. population are age 60 or older; but overall, only eight out of every 100 U.S. migrants were elderly (see Table 1, page 4).

Only about one-third of the U.S. population makes their home in the 12 Sunbelt states: Alabama, Arizona, California, Florida, Georgia, Louisiana, Mississippi, New Mexico, North Carolina, South Carolina, Virginia and Texas. These 12 states, however, drew more than half of the nation's elderly migrants.

Five Sunbelt states ranked among the ten most popular destinations. Florida, California, Arizona, and Texas ranked first through fourth, respectively. North Carolina ranked seventh. Florida alone welcomed more than one-fourth of the entire nation's elderly migrants.

But the Sunbelt states also attracted more than two-fifths (43 percent) of all U.S. migrants. Does the Sunbelt's elderly flow simply reflect general migration in that direction?

This is true in some Sunbelt states but not in others. In Florida, the elderly comprised nearly one-fourth of the state's inmigrant flow, three times the national average. Arizona exceeded and New Mexico equalled the national average of eight elderly out of every 100 migrants.

California did not. California drew the nation's largest group of general migrants and the second largest group of elderly migrants, but less than eight percent of its total migrants were over 60.

Due primarily to the numbers of elderly flocking to Florida and Arizona, however, the Sunbelt as a whole registered a larger share of elderly migrants than the nation as a whole. These differences suggest that certain regions within the Sunbelt hold different attractions for elderly migrants. The East Coast states directly north of Florida have become increasingly popular, particularly North Carolina, which jumped from the 27th to the 7th most popular destination for elderly movers between 1960 and 1980. These states now provide additional retirement options for persons who otherwise might have gone to Florida.

The Gulf states between Florida and Texas continue to attract elderly migrants, but they show little potential of rivaling the current major destination states within the Sunbelt. Texas, New Mexico and Arizona all attracted increasing numbers of elderly migrants during the past two decades, with Arizona's portion edging closer to California's declining portion.

Going South: Elderly Migration To the Sunbelt

Although all Sunbelt states received sizable numbers of elderly migrants between 1975 and 1980, only North Carolina, Florida, Texas, Arizona and California received major "streams"[1] from states outside the Sunbelt with which they share no common borders (see Figure 1). For example, Florida, the leading destination for elderly migrants nationwide, drew streams from Connecticut, Indiana, Massachusetts, Michigan, New Jersey, New York, Ohio and Pennsylvania.

These inmigration patterns showed some interesting changes between 1970 and 1980. The range of origin states widened when Pennsylvania joined the seven northeastern and midwestern states sending streams of elderly to Florida. New streams to Arizona originated in Iowa, Minnesota, Washington and Wisconsin. Also, Maryland and New Jersey began sending substantial numbers of migrants to North Carolina and elderly Kansans began settling in Texas.

In contrast, two streams received by California appear to have been "rerouted" to other Sunbelt states. Minnesota sent a stream to California in 1970 and by 1980 a new Minnesota-to-Arizona stream replaced it. Missouri also sent a stream to California in 1970 and by 1980 a new Missouri-to-Texas stream replaced it.

These recent migration patterns signal changes that will continue to be felt in the decade ahead. In the East, Florida maintained its position as the primary destination for East Coast elderly movers. North Carolina emerged

Table 1

Elderly migration to the Sunbelt from other U.S. states, 1975-1980

Sunbelt state	Number of interstate migrants received		Percent of interstate migrants received				Percent of state's inmigrants 60+ years
	total	ages 60+	total	(rank)	60+	(rank)	
Alabama	319,954	20,300	1.57	(25)	1.23	(27)	6.34
Arizona	598,368	93,709	2.94	(8)	5.66	(3)	15.66
California	1,877,289	145,018	9.22	(1)	8.77	(2)	7.72
Florida	1,801,362	428,559	8.85	(2)	25.9	(1)	23.79
Georgia	581,553	25,985	2.86	(9)	1.57	(14)	4.47
Louisiana	324,666	13,121	3.64	(24)	0.79	(35)	4.04
Mississippi	213,197	14,658	1.05	(33)	0.89	(31)	6.88
New Mexico	206,948	17,069	1.02	(34)	1.03	(30)	8.28
North Carolina	538,400	37,572	2.65	(14)	2.27	(7)	6.98
South Carolina	331,687	20,172	1.63	(23)	1.22	(25)	6.08
Texas	1,436,237	74,931	7.06	(3)	4.53	(4)	5.22
Virginia	694,880	33,727	3.41	(4)	2.04	(11)	4.85
Sunbelt migrants	9,249,207	924,821	43.45		55.91		10.36
U.S. migrants	20,358,454	1,654,261					8.13

Source: ref. 1

as a second major destination in the eastern Sunbelt. Since Florida's inmigration continued at record highs during the past decade, it seems more likely that North Carolina attracted a new group of migrants rather than diverted part of Florida's flow. South Carolina's recent increase in elderly migrants suggests that it may become an important center in the next decade.

In the central Sunbelt, Texas also emerged as a major destination for elderly settlers from outside the Sunbelt. Migration patterns to the western Sunbelt appear to be undergoing a major shift. In the 1960s, California was the Southwest's major destination for elderly migrants, with Arizona a distant second. By 1980, however, Arizona's major streams outnumbered California's streams and two of California's streams had been diverted to other Sunbelt states. Arizona now appears to be one of the fastest growing Sunbelt destinations for elderly migrants, threatening to overtake California's position during the next decade.

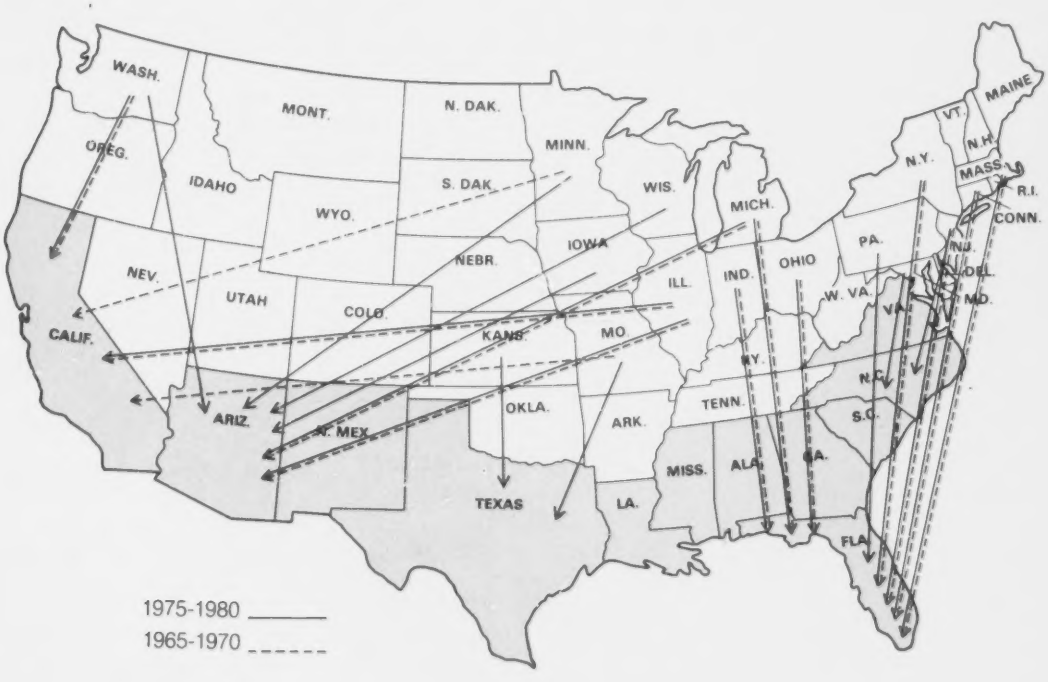
New Mexico, while still ranking low in national volume, bears watching during the 1980s. The recent near doubling of its elderly migrant flow suggests that its retirement communities will lure increasing numbers of retirees in the future.

Going Home: Elderly Migrants Leaving the Sunbelt

Both Florida and California sent significant numbers of elderly migrants to states *outside* the Sunbelt (see Figure 2, page 7). Major streams of elderly migrants left Florida for Michigan, New York, Ohio and Pennsylvania. The destinations of the streams of elderly leaving

Figure 1

Elderly migration to Sunbelt states from non-Sunbelt states that share no common borders.



Source: ref. 1

California were Arkansas, Colorado, Idaho, Missouri, Oklahoma, Utah and Washington.

The patterns to and from Florida were quite different from those to and from California. Streams from Florida all end in states that send migrants to Florida. Thus Florida's outmigration is most likely "return migration," consisting of persons who moved to Florida in their early retirement years and are returning to their state of birth to be near family after a spouse dies or with the onset of health or financial problems.[2]

Except for Washington and Missouri, no state receiving elderly migrants from California sent sizable streams to California. This migration pattern could be explained in several ways. First, long-term California residents who reach retirement age may establish a retirement residence elsewhere. California's destination states include the Ozark regions of northern Arkansas and southern Missouri, well-known retirement centers.

A second possible explanation for California's pattern could be a different kind of return migration. California, the state of golden opportunity during the first half of the 20th century, was a primary destination for interstate migrants of all ages. Persons who moved to California in early adulthood may return to their state of origin once they are free from job ties. Indeed, some may return to their state of birth to help care for their own aged parents.

Both California and Florida expanded their outmigration streams to include six more destinations by 1980. Streams to Michigan and Pennsylvania were added to Florida's two existing streams to New York and Ohio. (Florida's 1970 outmigration stream to Massachusetts now has disappeared.) By 1980, California added outmigration streams to Arkansas, Colorado, Idaho, and Missouri, to its 1970 streams to Oklahoma, Utah and Washington.

Regional Shuffle: Migration Within the Sunbelt

Although moves from northern states to the Sunbelt have been most pronounced, there is also considerable movement among Sunbelt states (see Figure 3). Virtually every Sunbelt state saw elderly move into and out of neighboring states in the 1960s and 1970s. One notable exception was Florida.

Since 1955, elderly Floridians have moved to Alabama, Georgia, and more recently to North Carolina, but *no* Sunbelt state has sent a major stream into Florida in the past 20 years. Florida's climate is similar to the Gulf states and persons living in Georgia or North Carolina may not desire a warmer climate. Elderly Floridians, however, may seek lower living costs, less crowding, or the more evident change of seasons in the states directly north of Florida.

Both in the 1960s and the 1970s, the greatest number of intra-Sunbelt streams emptied into Texas. Elderly migrants moved there not only from neighboring Louisiana and New Mexico, but also from Arizona and California. In 1970, Texas returned migrants only to New Mexico; but by 1980, elderly Texans were moving to Louisiana and California as well. Intra-Sunbelt migration is a major reason Texas ranks fourth nationwide in the number of elderly migrants it attracts.

Figure 2

Elderly "return" migration.

Figure 3

Elderly migration between Sunbelt states.

Source: ref. 1

Who Are These Elderly Migrants?

We have seen that the Sunbelt states gained more migrants than they lost. Using recent census data we can also determine what kinds of older persons moved in both directions (see Table 2).

A comparison of migrants to the Sunbelt with migrants from the Sunbelt yields surprising results. Between 1975 and 1980, the Sunbelt states gained wealthier and more independent elderly, and they lost lower-income, more dependent elderly.

The elderly migrants moving into the Sunbelt were younger, on the average, than those moving out of the Sunbelt and fewer were 75 years or older. They were predominantly white and more were married. Very few elderly persons moving to the Sunbelt were returning to their state of birth.

More Sunbelt migrants were living independently and fewer were living alone, or with a relative or in an institution. They were more highly educated and were less likely to be in the labor force or receiving welfare than their non-Sunbelt counterparts.

Inmigrants' average income exceeded that of the outmigrants on most income measures. Sunbelt migrants were more highly represented in upper-income brackets and more sparsely represented in poverty levels than were non-Sunbelt migrants.

While the Sunbelt as a whole attracted the younger, more independent elderly, there were important differences in the composition of the groups of migrants each major Sunbelt state received. An examination of the demographic characteristics of all of each state's new arrivals (migrants from other states and abroad) sheds light on the impact of their movement.

Arizona

Arizona drew the region's youngest migrants (see Table 3, page 10). They had the lowest average age, the lowest proportion over age 75 and almost all were white. Less than one per-

Table 2

Comparison of migrants into the Sunbelt with migrants into the non-Sunbelt, 1975-1980

Migrant characteristics	To Sunbelt	To non-Sunbelt
Size of sample used	18,598	5,709
Demographic		
Mean age	68.7	70.5*
% Age 75+	18.7	29.0*
% Male	45.8	40.5*
% White	95.1	93.1*
% Black	3.8	5.3*
% Cannot speak English well	2.2	1.2†
% Spanish origin	2.5	2.0†
% Married	68.7	51.3*
% Widowed	22.2	34.8*
% Returning to state of birth	6.0	31.0*
% Disabled	11.3	17.9*
Living arrangements		
% Living alone	15.7	22.3*
% Living independently	84.7	73.0*
% Living w/child	8.0	12.7*
% Living w/sibling	1.8	2.9*
% Living in institution	2.8	7.0*
% Living in home for aged	2.1	5.4*
Socioeconomic status		
Mean years of schooling	11.5	10.8*
% w/1+ years of college	28.7	24.1*
% in the labor force	13.4	14.8†
% on welfare	5.0	7.3*
Mean job income	10,705	9,872†
Mean business income	9,709	6,591†
Mean investment income	4,977	3,932*
Mean social security income	3,495	3,223*
Mean welfare income	2,279	1,958†
Mean pension and other income	5,760	4,914*
Mean total personal income	9,984	8,016*
Mean total household income	18,734	17,106*
% 200% + poverty level	71.9	60.4*
% below poverty level	7.7	12.1*

*Difference statistically significant at .001.
†Difference statistically significant at .05.

Source: ref. 2

cent were black and few were of Spanish origin.

Almost three-fourths of Arizona's elderly migrants were married and less than one-fifth were widowed. This state received both the fewest migrants returning to their state of birth and the fewest disabled migrants of any Sunbelt state.

Arizona's newcomers were also the most independent of all the groups of elderly movers; nearly nine in ten lived in independent households, and most lived with their spouse. These migrants had the highest education levels and their income averages were the highest (or next highest to Florida migrants) on all eight income measures. They represented the lowest percentage receiving welfare or living below the poverty line.

The fact that Arizona attracted migrants of similar if not higher income ranks than Florida is somewhat surprising. Arizona's migrants are primarily from the Midwest; Florida's migrants come from the Northeast where income levels and the cost-of-living tends to be the highest in the country. This suggests that Arizona draws the Midwest's most affluent elderly.

This influx of "young" and well-to-do elderly had a major impact on Arizona's older population. Arizona's approximately 96,000 new elderly residents reduced the average age, and increased the proportion of the state's married and white populations. They also reduced the disability rate among older residents (see Table 4, page 13). These migrants reduced the share of older people living alone.

Their educational level increased the average years of schooling completed by Arizona elderly. More of Arizona's inmigrants were fully retired, so they lowered the percentage of elderly in the labor force. They also brought higher social security and total household income, raising the average Arizona income in those categories. Migrants added to the high-income segment of the population and reduced the low-income segment.

Their impact on the housing market was significant. The majority of elderly migrants moved into new homes with complete plumbing and central air conditioning. Along with Florida, Arizona attracted the youngest elderly migrants who were wealthier and more independent than those received by other Sunbelt states.

California

In sharp contrast to Arizona, California's inmigrants were at the bottom of all independence ranks. They were older and more dependent than the elderly received by the other four leading Sunbelt destinations (see Table 3, page 10). Just over half of California's elderly migrants were married and nearly a third were widowed. About one in eight were disabled in some way.

Only about two-thirds—the lowest of any elderly migrant flow to the Sunbelt—were living in independent households. This was partially due to the large number of elderly migrants living with a child. Compared with Arizona or Florida migrants, nearly twice as many Califor-

Table 3

Comparison of the characteristics of all migrants received by the five major Sunbelt destinations, 1975 to 1980*

Migrant characteristics	Arizona	California	Florida	North Carolina	Texas
Demographic					
Mean age	68.1	69.7afn	68.3	69.1af	69.6af
% Age 75+	15.9	24.3afn	16.3	20.5af	25.8afn
% Male	47.3	40.3	47.6cnt	44.1c	41.4
% White	97.4cnt	77.5	97.5cnt	87.2c	90.5cn
% Black	0.5	4.0af	1.5a	11.6acft	3.5af
% Cannot speak English well	1.5	18.0afnt	4.4an	1.1	8.5afn
% Spanish origin	1.9	8.1afn	5.5an	1.1	8.9afn
% Married	73.4cnt	53.3	74.2cnt	60.0ct	56.2
% Widowed	18.3	33.1afn	18.2	29.0af	32.5af
% Returning to state of birth	1.2	3.0af	1.1	29.6acft	21.1acf
% Disabled	8.6	15.2afn	9.4	13.0af	16.0afn
% From abroad	2.0	27.0afnt	5.1an	2.1	8.9afn
Living arrangements					
% Living alone	13.7	18.2af	13.9	18.9af	18.0af
% Living independently	87.6cnt	65.1	88.3cnt	79.0ct	72.0c
% Living w/ child	7.3f	22.3afnt	6.0	10.0af	15.9afn
% Living w/ sibling	1.4	2.2aft	1.6	2.5af	1.5
% Living in institution	1.7	5.6af	1.4	4.8af	6.7afn
% Living in home for aged	1.2	3.8af	1.1	3.6af	5.7acfn
Socioeconomic status					
Mean years of schooling	12.0cfnt	10.6	11.5cnt	11.1ct	10.7
% w/ 1+ years of college	34.6cft	27.8	27.4	32.0cft	27.5
% in the labor force	12.7	18.5afn	11.4	14.6f	19.3afn
% on welfare	2.6	14.4afnt	4.1a	7.2af	7.2af
Mean job income	2,032.0	2,086.0f	1,821.0	1,904.0	2,746.0acfn
Mean business income	376.0c	164.0	267.0c	216.0	304.0c
Mean investment income	2,486.0cnt	1,667.0	2,647.0cnt	1,637.0	1,659.0
Mean social security income	2,426.0cnt	1,840.0	2,569.0acnt	2,269.0ct	2,028.0c
Mean welfare income	63.0	347.0afnt	94.0	115.0a	132.0a
Mean pension and other income	1,934.0ct	1,264.0	1,902.0ct	2,104.0ct	1,462.0
Mean total personal income	9,366.0cnt	7,333.0	9,256.0cnt	8,343.0c	8,298.0c
Mean total household income	18,084.0nt	16,058.0afnt	17,681.0	16,992.0	18,001.0
% 200%+ poverty level	69.7cnt	62.6	71.4cnt	64.2t	60.7
% below poverty level	7.5	9.9af	7.7	10.9af	10.3af

a—This state's mean is higher than Arizona.
c—This state's mean is higher than California.
f—This state's mean is higher than Florida.
n—This state's mean is higher than North Carolina.
t—This state's mean is higher than Texas.

*Includes migrants from all U.S. states and abroad.

Source: ref. 3

nia migrants moved into institutions or homes for the aged.

Many of California's migrants were still in the labor force. Nearly one-eighth of the migrants—more than double the proportion of any other Sunbelt state—received welfare, defined here as federal Supplemental Security Income programs. Finally, these migrants registered the lowest on several income measures including social security, pension, and total personal income.

Eighteen percent of California migrants said they did not speak English well. Many of these migrants claimed Spanish origin, indicating that they were Mexican-Americans coming to live with sons or daughters working there.

Migration brought nearly 200,000 new elderly residents to California between 1975 and 1980, with more than one in four coming from outside the United States. Among those migrants from abroad, one-fifth were born in the Philippines, one-tenth in China and one-tenth in Mexico. It should be noted that compared with Arizona, California received more than 13 times as many new elderly residents from abroad. If movers from abroad were excluded, the averages for California would be raised and the apparent differences between California and Arizona reduced.

Absorbing this group of new elderly residents significantly changed California's demographic profile. The new arrivals represented the lowest percentage of white migrants received by the five major Sunbelt destinations, but they increased the white component of the state's elderly population (see Table 4, page 13). The new elderly also increased the percentage who did not speak English well.

The elderly migrants reduced the independence levels of the state's elderly population. They lowered the average educational level, and also lowered all income measures except total household income. The increased household income average was due, no doubt, to the incomes of sons and daughters with whom almost one-fourth of these elderly migrants lived. The size of the public assistance checks received by California elderly migrants served to raise the state's average on welfare income.

California's migrants moved into newer dwelling units, more of which had central air conditioning than the homes of resident elderly. The elderly migrants lowered home ownership rates. Some of the impact on housing may be due to the sizable proportions of elderly migrants moving into institutions and homes for the aged. Most of these were built within the last 20 years and had central air conditioning installed at the time of construction.

Overall, California's migrants lowered both the residential and economic independence levels of the state's senior citizen population.

Florida

Elderly migrants to Florida were younger, more were married, and fewer were disabled or returning to their state of birth than migrants to

the other major Sunbelt destinations except Arizona. Florida migrants had household independence levels similar to Arizona's although fewer were living with a relative. Compared with Arizona, Florida received more than twice as many migrants from abroad. More than one in ten were Canadian born.

Florida migrants ranked second on average school years completed, but they had the lowest percentage of migrants with at least one year of college. Similar to Arizona migrants, Florida migrants' income levels were among the highest of all destinations.

Florida can be considered the prototype of the Sunbelt migration patterns. Not only did it attract the younger and more independent elderly, it also sent back the older and more dependent elderly, according to a recent study of migration streams between Florida and four northeastern states by Charles Longino of the University of Miami. The migrants who moved to Florida from New York, New Jersey, Pennsylvania and Ohio were younger, more were married, more were living independently, and had higher education and income levels than the migrants who left Florida for each of the northeastern states.[3]

The demographic impact of Florida's inmigration was similar to that of Arizona. Florida's influx of nearly 451,000 newcomers (including movers from abroad) reduced the average age but increased the state's percentage of senior citizens who were male, white, or married (see Table 4). It also reduced the disability level of the resident elderly population.

Although the percentage of elderly migrants living in independent households was not substantially larger than the percentage of local residents living independently, it was sufficient to reduce the segment living alone, in an institution or in a home for the aged.

These new Florida residents brought higher education levels, larger social security checks, and greater levels of personal and household income than the resident elderly. Overall, they increased the state's percent of elderly in the upper-income category and decreased the segment living below the poverty line. They also lowered the percentage of elderly in the labor force.

Finally, the migrants increased the share of elderly residents in new, high-quality homes with central air conditioning. Florida, then, along with Arizona, drew the youngest and most independent elderly migrants settling in the Sunbelt.

North Carolina

On most measures North Carolina's elderly inmigrants fell midway between those of the other major Sunbelt destination states (see Table 3, page 10). For example, North Carolina migrants were older than Arizona and Florida migrants but younger than California and Texas migrants. They also held the middle position for most measures of living arrangements and education levels.

There were several exceptions to this middle position, however. The largest percentage of

black migrants chose North Carolina as their destination. Also, the largest share of migrants returning to their state of birth were North Carolinians.

The new arrivals had the lowest average investment and total household income, and the next to lowest average job, business and total personal income. North Carolina received the largest percentage of elderly migrants below the poverty line of any of the five major destinations. Yet, the newcomers had the highest average income from pensions and other sources.

The influx had very little impact on North Carolina's population characteristics. For the most part, North Carolina attracted elderly inmigrants much like the elderly population already living there (see Table 4, below). The large

Table 4

The impact of migration on the characteristics of the resident elderly population in major destination states

Migrant characteristics	Arizona	California	Florida	North Carolina	Texas
Demographic					
Mean Age	-	0	-	0	0
% Age 75+	-	0	-	0	0
% Male	0	0	+	0	0
% White	+	+	+	+	0
% Black	-	0	-	-	-
% Cannot speak English well	-	+	0	0	+
% Spanish origin	-	0	0	0	0
% Married	+	-	+	0	-
% Widowed	-	+	-	0	0
% Disabled	-	0	-	0	0
Living arrangements					
% Living alone	-	-	-	0	-
% Living independently	-	-	0	0	-
% Living w/child	0	+	0	0	+
% Living w/sibling	0	+	-	0	0
% Living in institution	0	+	-	0	0
% Living in home for aged	0	+	-	0	0
Socioeconomic status					
Mean years of schooling	+	-	+	+	+
% w/1+ years of college	+	0	+	0	+
% in the labor force	-	+	-	0	0
% on welfare	-	+	-	0	0
Mean job income	0	-	0	0	0
Mean business income	0	-	0	0	0
Mean social security income	+	0	+	+	0
Mean welfare income	0	+	+	0	0
Mean total personal income	0	-	+	0	0
Mean total household income	+	+	+	0	+
% 200%+ poverty level	+	0	+	+	+
% below poverty level	-	0	-	-	-
Age of housing	-	-	-	-	-
Home ownership	0	-	0	0	-
Complete plumbing	+	0	+	+	+
Central air	+	+	+	+	+

Source: ref. 2

white component of the state's inmigrant flow did alter the racial composition of the elderly population. Also, the higher income levels increased the portion of the population in upper-income brackets and decreased the percent living below the poverty level. Most migrants lived in new homes with complete plumbing and central air conditioning.

Overall, North Carolina migrants represented the middle ranges for household income and independence levels. Where they did have an impact on the state's demographic profile, they served to raise the population's level of independence.

Texas

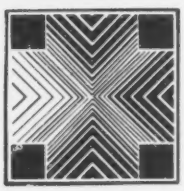
Migrants who moved to Texas ranked next to the lowest in independence levels (see Table 3, page 10). On many characteristics, Texas migrants were similar to California's newcomers although a greater percentage of Texas migrants were white. Further, among elderly migrants to Texas from abroad more came from Mexico (one-third) than any other country.

With the exception of California migrants, fewer Texas elderly migrants lived independently and more were needy. They represented the lowest percentage in the upper-income category, and next to the highest percentage of elderly living below the poverty line.

Texas' approximately 83,000 elderly migrants (including movers from abroad) were similar to the resident population in many ways; where they differed, they improved the independence level of the total elderly population (see Table 4, page 13). Migrants raised the average level of education and total household income. The percentage of Texas elderly in the upper-income category increased and the segment below the poverty line decreased. Migrants moved into new homes of better quality than the state's elderly residents. Most newcomers were renters, however, so they lowered the state's elderly home ownership rate.

The influx of migrants decreased the portion of the Texas residents who were black and increased the proportion who did not speak English well. The percentage of married elderly also decreased. Texas migrants also decreased the percentage of elderly living alone. On the other hand, they also decreased the percentage living in independent households and increased the percentage living with a child.

Only California's elderly migrants were more dependent than those moving to Texas. Nevertheless, these newcomers contributed to a decrease in dependency in both income and household arrangements.



The Consequences of a Graying Sunbelt

Each decade finds more citizens in their retirement years moving to the Sunbelt. This flow of migrants has every indication of continuing, if not increasing in number, during the late 1980s and early 1990s. Most migrants are in their early retirement years, are well-educated, financially secure, and accompanied by their spouse to establish independent households. At the same time, the Sunbelt is losing its older, more dependent elderly to the non-Sunbelt states.

But, when we look at migration from all other states and abroad, the kinds of elderly persons moving to the five major Sunbelt destinations varies widely. Arizona and Florida drew the youngest and most independent elderly migrants. These newcomers lowered the age and raised the independence levels of the states' resident elderly populations.

The "graying" of Florida and Arizona, then, means increased demand for retail goods, recreational, health and protective services, and for new housing suitable for retired couples. Because of the new migrants' affluence, few will seek jobs or welfare.

On the other hand, California and Texas attracted the older, more dependent elderly. The large segment of elderly migrants moving into homes of relatives or institutions will place little demand on the housing markets in these states. The demand for retail, health and protective services, however, will increase somewhat in both states.

In California, the large number of migrants receiving welfare will place additional pressure on local and state social services and agencies for the aged.

A similar burden will be shouldered by non-Sunbelt states losing their younger, more independent elderly to the Sunbelt and receiving older, more dependent elderly in return. The loss of upper-class elderly means less demand for retail services and a shrinking tax base to finance programs needed by dependent elderly returning "home."

Despite the different age or independence levels of their groups of elderly migrants, all Sunbelt states must prepare to cope with the increased numbers of older citizens. Local communities will find older people pressing supermarket, drug store, variety and department store lines awaiting service and demanding their "Golden Age" discounts.

Physicians, particularly those who specialize in geriatrics, heart disease and chronic diseases such as arthritis, will be challenged by increased patient loads for both short-term and long-term care. Increased demand on housing will press the capacity of local water and sewer systems along with other utilities. The elderly's vulnerability to crime will bring added demand for protection by local police and fire departments.

The new elderly inmigrants bring the more fiscally conservative orientation typical of their generation. The degree of their impact on local and state politics is yet to be discerned. Recent support for a proposition to cut the Florida budget by nearly one-fourth suggests a conservative swing in that state. If Florida is representative of political change in the Sunbelt, fiscal conservatism can be expected to increase in many areas.

Further, the types of public projects receiving voter support are likely to change. Priority may shift from preschool classroom enrichment and hot-lunch programs in the public schools to services provided by local aging agencies. Bond issues for school construction may find less support than those for adult recreation facilities and increased fire and police department protection.

To all the Sunbelt states, the "graying" process brings a larger elderly population. These states will be challenged to make changes in both the private and public sectors rapidly enough to meet both the demands of their elderly newcomers who move to the "fun and sun" states to enjoy their retirement, and the needs of their older, more dependent elderly.

Federal Policy Implications

The "graying" of the Sunbelt brings prosperity to Arizona and Florida, increased public welfare demand to California, and a reduced tax base *and* increased public welfare demand to many states outside the Sunbelt.

Yet, federal funds for state-run programs under the Older Americans Act are allocated based on the size of the state's population age 60 and over. Arizona and Florida whose elderly are clearly from upper-income levels receive as much support per older person as California and Michigan.

The Older American's Act, which included about $640 million for senior centers and meal programs in fiscal 1983, was intended to benefit all senior citizens not just the poorest individuals. In 1978, Congress reaffirmed this position, but asked that special consideration be given to the needs of low-income elderly.

As the richest elderly move to a few states leaving the poorer elderly behind, "special consideration for low-income elderly" may mean a new formula for determining each state's share of Older Americans Act funds. If the disability rates, income levels and household arrangements of a state's elderly population are considered, states could share more equitably in the Act's funds.

Before 1981, the other major source of federal funds for state-run programs benefiting senior citizens came under Title XX of the Social Security Act. A variety of child day care, family planning, emergency services, and transportation and home-based services for the elderly and disabled were financed in this manner. During 1981, all these services were consolidated into Social Services Block Grants and the funds cut back. Now, the states themselves decide who is eligible and which services receive priority. States also decide how much local funds will be used to supplement the federal money received.

According to an August 1984 report by the U.S. General Accounting Office, 11 out of 13 states surveyed have used state and local funds to increase this type of social services spending since the federal funding cutbacks took place.[4] Despite increased state spending, total program budgets have not kept pace with inflation, according to the report.

The $2.7 billion in funds states receive under the Social Service Block Grants are allocated according to the size of the state's population of all ages. Numbers of disabled or dependent elderly, for example, are not taken into account. This sort of formula is short-changing states such as Illinois, New York, Michigan and Pennsylvania that are losing their wealthy elderly to the Sunbelt and receiving older and lower-income elderly in return. California, which is gaining large numbers of low-income elderly residents, may be similarly slighted. Raising state and local funds to serve these larger-than-average poor elderly populations becomes more challenging in these states.

Only a radical change in federal allocation formulas will compensate for the inequities. The age, household and economic dependence levels in each state's elderly population must be considered along with total numbers when determining federal payments to the states. Only in this way will all state budgets be equally tapped to provide adequately for the needs of their elderly population.

Footnotes

1. An interstate migrant stream refers to a particular state-to-state migration pattern as determined by an analysis developed by Wiseman and Roseman, 1972. This technique isolates those state-to-state streams that are larger than would be expected from the proportional distribution of the nation's total elderly migration patterns.
2. Longino, Charles F., Jr., "Going Home: Aged Migration in the U.S., 1965-1970," *Journal of Gerontology*, 34:736-745, 1979.
3. *Ibid.*
4. U.S. General Accounting Office, "States Use Several Strategies to Cope with Funding Reductions Under Social Services Block Grants," *Report to the Congress*, HRD-84-68, August 9, 1984.

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1. U.S. Bureau of the Census, 1980 Census of Population. *Residence in 1975 for States by Age, Sex, Race, and Spanish Origin*. Supplementary Report PC80-S1-16. Washington, D.C.: U.S. Government Printing Office, 1984.
2. Data tabulated from Bureau of Census printed documents for 1960, 1970 and 1980; the one-in-one hundred Public Use Sample (PUS) of Basic Records for 1960; the one-in-one hundred state 15 percent PUS for 1970; and the five-in-one hundred Sample A, Public Use Microdata Sample for 1980.
3. Data same as above. The figures in this table are significant at .05.

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